

THE TWENTY-EIGHTH ANNUAL FALL PROGRAM

This one day comprehensive program focuses on several estate planning, litigation and tax issues which are important to trusts and estates professionals. Noted experts will provide updates and in-depth analysis on a variety of issues such as:

- Practical tips from Probate Court officers to avoid delays and frustrations due to problems encountered in the administration of decedent's estates, trusts, conservatorships and guardianships.
- Intermediate/advanced course in income taxation of estates and trusts; tax savings, planning opportunities, and available elections.
- Recent developments in California's statutory and case laws and federal tax laws.
- Practice pointers for trusts and estates litigators. When must fiduciaries stay neutral in disputes with beneficiaries? Traps for the unwary.
- Learn purposes of a special needs trust (SNT), preserving benefits for disabled or aged beneficiaries; types of SNT's, different court requirements for proper administration of SNT's.



STATE BAR EDUCATION FOUNDATION
Trusts and Estates Section
180 Howard Street
San Francisco, CA 94105

THE STATE BAR OF CALIFORNIA
Trusts and Estates Section
Presents

The Twenty-Eighth Annual Fall Program



November 5, 2004

Los Angeles Omni Hotel

251 Olive Street

Los Angeles, CA 90012

8:15 a.m. to 5:30 p.m.

**Online registration now available at
www.calbar.ca.gov/trusts**

8 hours MCLE Credit

The State Bar of California and the Trusts and Estates Section certify that this activity has been approved for MCLE credit by the State Bar of California in the amount of 8 hours.

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Presented by
The Trusts and Estates Section of the State Bar of California

November 5, 2004 • Los Angeles

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8:15 a.m. to 5:30 p.m. • Registration begins at 7:45 a.m.

REGISTRATION INFORMATION PROGRAM MATERIALS

DEADLINE: Your form and check, payable to The State Bar of California, or credit card information must be received by November 2, 2004. **Please register early because space is limited.**

MAIL TO: Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to The State Bar of California.

FAX TO: Program Registrations at (415) 538-2368. Credit card information is mandatory.

REGISTER ONLINE Online registration can be accessed at www.calbar.ca.gov/trusts. Deadline for registration is November 2, 2004.

ON-SITE REGISTRATIONS: On-site registration is on a space available basis only.

QUESTIONS: For registration information, please call (415) 538-2206.

REFUNDS: All requests for refunds must be in writing and received by November 2, 2004.

SPECIAL ASSISTANCE: Please call (415) 538-2206 for special assistance or (415) 538-2231 TDD for speech and hearing impaired.

TAPE & MATERIALS: If you would like to order an audio cassette and program booklet, please contact Versa-Tape Company at (800) 468-2737. Cost for the tape and booklet is \$170. MCLE self study only.

PROGRAM AGENDA

8:15 to 10:15 Recent Developments: What Trusts and Estates Lawyers Need to Know

James R. Birnberg, Esq., Oldman, Cooley, Leighton, Sallus, Gold & Birnberg LLP

Mary F. Gillick, Esq., Luce, Forward, Hamilton & Scripps LLP

Thomas B. Worth, Esq., Law Offices of Thomas B. Worth

Trusts and Estates attorneys need to be up-to-date on the law in order to provide accurate advice. Hear about recent developments in California's statutory and case laws and federal tax laws.

10:30 to 11:30 Fiduciary Income Tax - Taxation of Trusts and Estates

James M. Allen, Esq., Leland Parachini et al.

This intermediate/advanced session will discuss income taxation of estates and trusts including various tax savings and planning opportunities and available elections

11:30 to 12:55 LUNCH PRESENTATION -

Case Budgeting in Trust Litigation or How to Handle Your Contested Trust Matter and Not End Up “In Forma Pauperis”

John A. Duncan, Esq.

1:00 to 2:00 Trusts and Estates Litigation: Practice Pointers and Traps for the Unwary

Adam F. Streisand, Esq., Loeb & Loeb LLP, Los Angeles

For anyone involved in a contested trust or estate matter, you will want to be sure you are briefed on the latest developments or 21320 applications when fiduciaries must stay neutral in disputes with beneficiaries, and more

2:15 to 3:15 Special Needs Trusts

John A. Payne, Jr., Esq.

Nancy Eberhart, Court Operations Manager, San Diego Probate Court

Using Special Needs Trusts (most commonly to hold the proceeds from a judgment or settlement, but sometimes to hold the proceeds from an inheritance or other source), with emphasis on the requirements of the various courts to ensure that the trust is properly administered.

3:30 to 5:30 Maneuvering Through the Probate Courts - Practical Tips for Avoiding Delays and Frustration

Sandra R. Riley, Supervising Probate Attorney, Los Angeles Superior Court

Don E. Green, Esq., Commissioner, Contra Costa County Probate Court

Linda C. Martinez, Esq., Orange County Probate Court

This session will focus on tips for avoiding probate pitfalls. Topics covered by the panel will include: common filing errors, the application of local court rules, common problems encountered in the administration of estates of decedents, trusts, conservatorships and guardianships.

REGISTRATION FORM

THE TWENTY-EIGHTH ANNUAL FALL PROGRAM

PRESENTED BY
THE TRUSTS & ESTATES SECTION OF THE STATE BAR OF CALIFORNIA

Note: Please use a separate form for each registrant

State Bar Number _____

Name _____

Firm _____

Address _____

City, State, Zip _____

Phone _____

Fax _____

E-mail _____

REGISTRATION FEES (Check appropriate box)

☐ \$240 Members of the State Bar of California
Trusts and Estates Section

☐ \$300 Non-Members
Note: \$60 of your non-member registration fee will be applied to a 2005 membership in the Trusts and Estates Section

CREDIT CARD INFORMATION

I authorize The State Bar of California to charge my program registration to my VISA or MasterCard account. (No other credit card will be accepted.)

Account Number _____ Exp. Date _____

Card Holder's Name _____

Cardholder's Signature _____

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